

# ShareFile Streamlines Legal Workflows with New Features

ShareFile, a business unit of Cloud Software Group, Inc., and the provider of the ShareFile® secure, collaborative client experience technology, announced today new enhancements to help law firms simplify everyday processes without sacrificing security or client experience. Designed specifically for legal professionals, these features help firms streamline workflows, protect client data with robust security protocols, and deliver an exceptional client experience at every touchpoint.

Many law firms deal with complex manual processes that can take time away from client work. At the same time, they must protect against the persistent threat of cyberattacks and meet ever increasing client expectations. By automating recurring processes, accelerating non-billable tasks, and helping keep critical data secure, ShareFile is transforming the way law firms manage workflows so they can focus on what they do best – practice law.

“Law firms everywhere face challenges around complex workflows and security, and we are excited about the value ShareFile is delivering for legal professionals,” said Mike Fouts, Chief Business Officer, ShareFile. “At ShareFile, we are focused on giving law firms tools created specifically for them so their repetitive tasks don’t get in the way of serving clients. These new features will change the way they manage workflows that are essential to firm success.

To complement existing capabilities such as information requests, customizable templates, automated threat remediation, and AI-powered secure share recommendations, ShareFile has introduced new features that:

- Standardize and centralize client matters: The Legal Client

Intake and Engagement solution is a simple-to-use solution that helps to streamline client intake and interaction for any field of law. This solution brings together disjointed client processes – onboarding, information gathering, discovery management, activity log reports, and secure client communication – to deliver a consistent, simple client management experience.

- Support quicker client interaction: With the enhanced experience in ShareFile's actionable client portal, firms can improve client response time. Within the ShareFile portal, users can more easily and quickly view tasks and take actions like submitting documents for review as part of the discovery process or completing a digital intake form.

- Simplify discovery: AI-powered document list generation enables ShareFile users to leverage generative AI to create document list items. Users can edit and save items as templates they can then reuse, saving time, ensuring consistency, and supporting scalability.

- Speed up the payment process (coming soon!): The Client Billing solution enables firms to seamlessly create payment requests for invoices, flat rates, retainers, or contingencies that require payment processing, helping optimize cash flow. ShareFile provides integration with leading payment processing platforms for secure and PCI-compliant transactions.

“Lawyers are looking for ways to streamline workflows, work with clients easily and securely, and reduce redundancy in their tech stack,” said Catherine Sanders Reach, Director of the Center for Practice Management at the North Carolina Bar Association\*. “ShareFile steps in to provide firms key document workflow technology in a single tool, reducing manual processes and simplifying work. They are committed to understanding lawyers’ key processes and identifying opportunities to enhance security, efficiency, and client service delivery.”

## Availability

The Legal Client Intake and Engagement solution is available as a beta release with access limited to ShareFile Premium and Industry Advantage customers. Specific pricing and packaging for the solution will be announced upon general availability. Additional terms and conditions may apply.

The AI-powered document list generation feature is available as a beta release with access limited to ShareFile Premium and Industry Advantage customers. Specific pricing and packaging for this feature will be announced upon general availability.

The timeline for the Client Billing solution is coming soon and subject to change at any time at our discretion.

Visit <https://www.sharefile.com/industry/legal> to learn more about ShareFile for legal firms and the latest enhancements.

\*The opinions expressed are solely those of the individual in a personal capacity and do not represent those of the North Carolina Bar Association; this statement is not made in an official capacity as a representative of the North Carolina Bar Association.

## About ShareFile

ShareFile, a business unit of Cloud Software Group, helps you deliver a modern client experience with collaboration and workflow technology that is secure, easy to use, and made to fit your organization. Designed with highly regulated industries in mind, ShareFile offers secure, digital technology to simplify workflows and improve collaboration. ShareFile works with your existing technologies, and gives you added visibility, speed, and efficiency without having to sacrifice security. [www.sharefile.com](http://www.sharefile.com)

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